



Contract Management System Signing an Online Claim – Step 3


This document provides step-by-step instructions on how to sign an online claim in the Contract Management System (CMS).

Online claims must be signed by an individual within your organization that has the legal authority to submit a claim on behalf of your organization.

In CMS, the CLAIMSIG serves as the designated signatory.



At any time, if there are issues that prevent you from signing the claim, select “Decline”, correct the issue(s) and/or contact your OCFS Program Manager for further assistance.

| STEP | DISPLAY |
|---|--|
| 1. Log into CMS with the correct user role. | |
| 2. Select “Inbox” from the main menu. |  |



3. Select “EXPEN” from the “Task” column to review the details of the claim.



| CMS Inbox | | | | | | |
|-----------------------|----------|-------------------------|-------------------------------------|--------------------------------|------------------|----------------------|
| Task | Contract | Program Name | Review Stage | Reviewer | Log Status | Stage Days Remaining |
| EXPEN | C028235 | Admin. Software | With Contractor | Management, Quality [CONUSER] | Pending | 0 |
| EXPEN | C028262 | Advantage After School | Package To Contractor For Signature | Management, Quality [CLAIMSIG] | Pending | 5 |
| EXPEN | C028262 | Advantage After School | With Contractor | Management, Quality [CONUSER] | Pending | 0 |
| EXPEN | C028262 | Advantage After School | With Contractor | Management, Quality [CONUSER] | Pending | 0 |
| EXPEN | DATA003 | Administrative Services | With Contractor | Management, Quality [CLAIMSIG] | Contract Pending | 0 |

4. Select “Run Edit”. CMS will check the claim for calculation errors and/or rule violations.

| Budget Category | Budgeted | Previous Expended | Claim Expended | Manual Disallowance | Reason ** | System Disallowance | Adjusted Claim | Expended to Date | Balance |
|------------------------------|-------------|-------------------|----------------|---------------------|-----------|---------------------|----------------|------------------|------------|
| Personal Services | | | | | | | | | |
| Personnel | \$10,000.00 | \$110.00 | 1000.00 | 0.00 | NA | \$0.00 | \$1,000.00 | \$1,110.00 | \$8,890.00 |
| Fringe Benefits | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Subtotal | \$10,000.00 | \$110.00 | 1000.00 | 0.00 | | \$0.00 | \$1,000.00 | \$1,110.00 | \$8,890.00 |
| Non-Personal Services | | | | | | | | | |
| Contractual/Consultant | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Travel/Per Diem | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Equipment | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Supplies | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Other Expenses | \$0.00 | \$100.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$100.00 | (\$100.00) |
| Subtotal | \$0.00 | \$100.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | \$100.00 | (\$100.00) |
| Total | \$10,000.00 | \$210.00 | 1000.00 | 0.00 | | \$0.00 | \$1,000.00 | \$1,210.00 | \$8,790.00 |

[Run Edit](#) [Reject](#) [Process](#) [Print](#)



If errors or rule violations are found, you must correct the issue(s) and/or contact your OCFS program manager for further assistance. Once corrections are made, you will need to select “Run Edit” again.



5. If no errors or rule violations are found, a certification statement will appear on the screen.

Select
"Accept"
and then
select
"Process".

Certification:

I certify that the above information is just, true and correct; that the expenses for the period have been incurred and paid for and have not been previously claimed; and that such expenditures are proper and necessary for the program. I am aware that any advance received prior to this expenditure will be recouped in accordance with my signed contract document.

☒ Accept ☐ Decline

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6. You have now signed your claim. An electronic signature and date will appear along with a message "Process Operation Successful" in the top right corner.

Process operation successful

| Budget Category | Budgeted | Previous Expended | Claim Expended | Manual Disallowance | Reason ** | System Disallowance | Adjusted Claim | Expended to Date | Balance |
|------------------------------|-------------|-------------------|----------------|---------------------|-----------|---------------------|----------------|------------------|------------|
| Personal Services | | | | | | | | | |
| Personnel | \$10,000.00 | \$110.00 | 1000.00 | 0.00 | NA | \$0.00 | \$1,000.00 | \$1,110.00 | \$8,890.00 |
| Fringe Benefits | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Subtotal | \$10,000.00 | \$110.00 | 1000.00 | 0.00 | | \$0.00 | \$1,000.00 | \$1,110.00 | \$8,890.00 |
| Non-Personal Services | | | | | | | | | |
| Contractual/Consultant | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Travel/Per Diem | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Equipment | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Supplies | \$0.00 | \$0.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Other Expenses | \$0.00 | \$100.00 | 0.00 | 0.00 | NA | \$0.00 | \$0.00 | \$100.00 | (\$100.00) |
| Subtotal | \$0.00 | \$100.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | \$100.00 | (\$100.00) |
| Total | \$10,000.00 | \$210.00 | 1000.00 | 0.00 | | \$0.00 | \$1,000.00 | \$1,210.00 | \$8,790.00 |

Electronically Signed by:
Quality Management
Tester
WOODCHUCK LODGE
02/14/2022

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